

# Conservator Inventory Report

**Protected Person's Name** \_\_\_\_\_

**Date** \_\_\_\_\_

## Assets

### Cash (checking, saving, CDs, etc.)

	\$	

Total Cash \$ \_\_\_\_\_

### Investments (stocks, bonds, etc.)

	\$	

Total Investments \$ \_\_\_\_\_

### Real Estate

	\$	

Total Real Estate \$ \_\_\_\_\_

### Vehicles

	\$	

Total Vehicles \$ \_\_\_\_\_

### Insurance Policies (state face value on description line, cash surrender value on \$ line)

	\$	

Total Insurance Policies \$ \_\_\_\_\_

### Personal Property (only individually list items of great values, otherwise, state a grand total)

	\$	

Total Personal Property \$ \_\_\_\_\_

**Total Assets** \$ \_\_\_\_\_

## Liabilities

### Credit Cards

	\$	

Total Credit Cards \$ \_\_\_\_\_

### Loans (Mortgages, Vehicles, Personal loans, etc.)

	\$	

Total Loans \$ \_\_\_\_\_

### Other Liabilities

	\$	

Total Other Liabilities \$ \_\_\_\_\_

**Total Liabilities** \$ \_\_\_\_\_

**Total Net Worth** \$ \_\_\_\_\_

Note: If any assets of the protected person have been sold during this time period, please complete the Conservatee Report of Assets Sold on the Conservator Income & Expense Report. If additional space is required for descriptions or detailed listings, please attach the information on separate sheets of paper.